

# Client Privacy Policy

## Overview

A privacy policy is a written, published statement that articulates the policy position of an organization on how it handles the personally identifiable information that it gathers and uses in the ordinary course of business.

## Purpose

The purpose of the Copeland Buhl & Company PLLP (CBCO) Client Privacy Policy is to notify customers and website visitors of our privacy practices regarding the collection, use, sharing, security, and maintenance of the personal information we receive.

## Scope

The CBCO Client Privacy Policy applies to persons who have or may have information collected through normal business activities with CBCO. The primary information collection methods can include but may not be limited to the CBCO website, through email, or as part of certain file transfers.

## Policy

### Notice

- We only collect the information you voluntarily share via website, email, or other direct contacts.
- We will not sell or rent this information to anyone.

### Purpose

- We will use information provided by you to respond to your request.
- We only share your information with authorized business partners related to processes for your request.
- We may contact you for company-related messaging; you can request not to receive these communications.

## Consent

- We will not voluntarily share your information with a third party without prior authorization, except:
  - With an affiliate or agent of CBCO,
  - With written authorization,
  - To enforce our privacy policy, to comply with law, regulation, or other legal processes, or to protect the rights, property, or safety of us or others,
  - With a regulator or law enforcement agency or staff,
  - In emergencies,
  - To protect against misuse or unauthorized use of CBCO information systems,
  - To detect or prevent criminal activity or fraud

## Ownership and Rights

Protected information belongs to the customer or business partner from which it originated. CBCO does not claim ownership once the data has been imported into our systems. You have the following rights and expectations about protected information that CBCO holds:

- At any time, upon authorized request, CBCO will purge all or part of any protected information from all its systems.
- At any time, upon authorized request, CBCO will export all or part of any protected information from its systems for transmission back to its owner.
- At any time, upon authorized request, you may alter or amend how CBCO is approved to use and process your information.

## Security

- We take precautions to protect your information both online and offline.
- CBCO has implemented administrative, physical, and technical safeguards to protect the information we collect and maintain.
- We restrict access to your information maintained within our databases to authorized users.
- Information is kept only if necessary for the intended purpose or service.

## Access

- You may opt-out of communication with us at any time.
- You can contact us via email or phone to:
  - Find out what data we maintain about you, if any.
  - Change/correct any information we have about you.
  - Have us delete any data we have about you.

### Accountability

CBCO is committed to resolving any complaints about your privacy and our collection or use of your personal information. If you have any questions or complaints regarding this policy, please contact us at [info@copelandbuhl.com](mailto:info@copelandbuhl.com).

- Our website includes links to other websites. Our Privacy Policy does not apply to links or other websites.
- We do not endorse and are not responsible for the operation or content of other websites.
- We may modify, alter, or update our privacy policy at any time.